

# Chapter 7



## Folders

### Chapter Overview

#### Introduction

**Folders** are on-line displays of information.

You can identify a folder from a regular block by the following:

- An Open Folder button  displays in the upper-left corner of a folder block and
- The Folder Tools button on the Toolbar  is enabled (is not dimmed) when your cursor is in a folder block.

You can customize the display of data in folders and you can define your own, private, folders. In addition to viewing data in folders on-line, you can print and export the data.

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#### See Also



Module 1, Fundamentals of the Modern DCPDS  
 Chapter 3, Navigating the Modern DCPDS  
 Chapter 6, Retrieving Records

#### Term

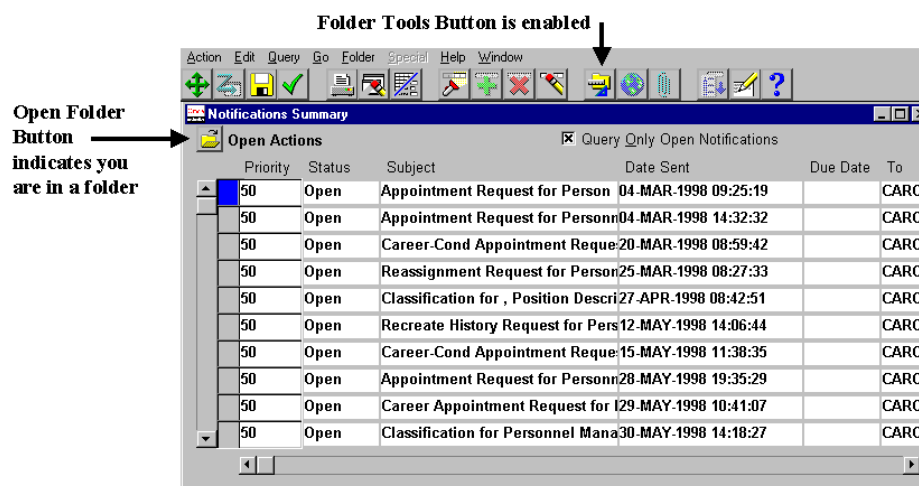
**Folder Definition:** Folders which you have “created” by customizing standard modern DCPDS folders. When you customize a modern DCPDS folder, you can “define” (specify) the records to be displayed (by setting query criteria), and you can customize the layout of the data displayed for these records.

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## Chapter Overview, Continued

### Illustration

#### ◆ Example of a Folder:



### Where to Find Folders

You will find many folders throughout the modern DCPDS. Many of them can be accessed via:

- **Navigation List** → *View* → *Lists*
- **Navigation List** → *View* → *Histories*
- **Navigation List** → *Civilian Inbox*

### Customization Features

By default, folders display all records matching your query, and all data fields available within the folder. You can, however:

- Display a subset of records based on your specific criteria.
- Display a subset of records in a specific order.
- Automatically query for a subset of records each time you open a specific folder.
- Display only those data fields of interest to you.
- Instantly modify the column width, sequence, and labels of the data fields you want to display.
- Save your folder customizations for future use.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default display for a folder.

## Folder Menu and Folder Tools


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**Purpose** To customize folders, you will need to use the **Folder Menu** and the **Folder Tools Palette**.

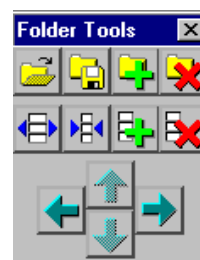
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**Folder Tool Palette** For many of the **Folder** menu items there is a corresponding button, which performs the same function.

To access the folder buttons:






- Click the **Folder Tools** button  on the Toolbar, which becomes enabled when you navigate to a folder block.

The **Folder Tools Palette** displays:



### Folder Menu Items










Below are the items listed in the **Folder** menu and the actions you can perform with them. Included for many is a button from the **Folder Tools Palette** that you can use to perform the same function without using the Toolbar.

To...	Click...	Button
Create a new folder definition.	<b>F</b> older → <b>N</b> ew...	
Open a saved folder definition.	<b>F</b> older → <b>O</b> pen...	
Save current folder definition.	<b>F</b> older → <b>S</b> ave	
Save current folder definition to a new one with a new name.	<b>F</b> older → <b>S</b> ave <b>A</b> s...	
Delete an existing folder definition.	<b>F</b> older → <b>D</b> elete...	
Show the current data field.	<b>F</b> older → <b>S</b> how <b>F</b> ield	

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## Folder Menu and Folder Tools, Continued

### Folder Menu Items (continued)

To...	Click...	Button
Hide the current data field.	<b>F</b> older → <b>H</b> ide <b>F</b> ield	
Move the current data field to the right.	<b>F</b> older → Move <b>R</b> ight	
Move the current data field to the left.	<b>F</b> older → Move <b>L</b> eft	
Move the current data field up. This folder option is not available in the Civilian Inbox.	<b>F</b> older → Move <b>U</b> p	
Move the current data field down. This folder option is not available in the Civilian Inbox.	<b>F</b> older → <b>M</b> ove <b>D</b> own	
Increase the width of the current data field.	<b>F</b> older → <b>W</b> iden <b>F</b> ield	
Decrease the width of the current data field.	<b>F</b> older → <b>S</b> hrink <b>F</b> ield	
Change the prompt for the current data field.	<b>F</b> older → <b>C</b> hange <b>P</b> rompt...	
Adjust all data field widths to completely show their data.  <b>Caution:</b> This cannot be undone without resizing each window.	<b>F</b> older → <b>A</b> utosize <b>A</b> ll...	
Toggle the display of the Order By buttons so you can specify the sort order for the first three data fields.	<b>S</b> how <b>O</b> rd <u><b>e</b>r</u> <b>B</b> y	
Display the query criteria for the current folder definition.	<b>F</b> older → <b>V</b> iew <b>Q</b> uery	
Erase the current query criteria.	<b>F</b> older → <b>R</b> eset <b>Q</b> uery	
Display the folder tool palette.	<b>F</b> older → <b>F</b> older <b>T</b> ools	

## Defining Query Criteria for a Folder

### Purpose


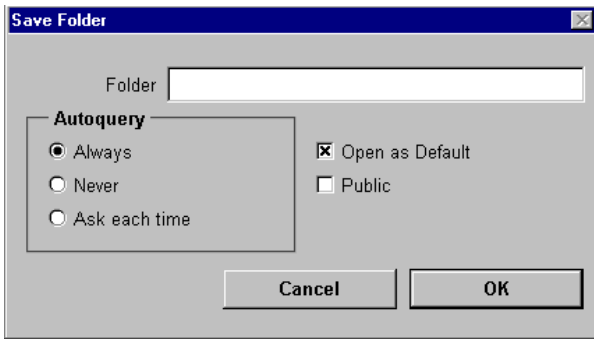
You can easily customize a folder to display only the records you want to see. You do this by altering the query criteria for the folder and then saving the new criteria in a *folder definition*.

By default, folders display all records matching your query. You can, however:

- Display a subset of records based on your specific criteria.
- Automatically query for a subset of records each time you open a specific folder.

### Defining Query Criteria for a Folder

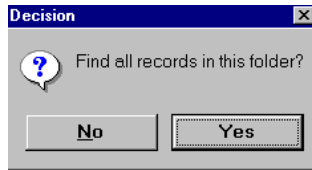

Follow the procedures below to define a folder to display a particular set of records.

Step	Action
1	Open a folder, then click your cursor anywhere within the folder.
2	Run a query to retrieve the records you want, using Query Find or Query-by-Example (Query Enter, Query Run or use a short cut key).  <b>Note:</b> At least one record must be retrieved for the folder to memorize the query.
3	Click <b>F</b> older → <b>S</b> ave <b>A</b> s...from the Main Menu Bar or from the Save button from the Folder Tool Window if you want to save the criteria in a folder definition. A <b>Save Folder</b> Window displays: 
4	Type a new and unique name for the folder definition in the <i><b>F</b>older</i> data field.

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## Defining Query Criteria for a Folder, Continued

### Defining Query Criteria for a Folder (continued)

Step	Action
5	<p>In the <b>Autoquery</b> box, click:</p> <p><input checked="" type="radio"/> <b>Always</b> if you want this query to perform every time you open this folder definition.</p> <p><input type="radio"/> <b>Never</b> if you don't want this query to be saved with this folder definition.</p> <p><input type="radio"/> <b>Ask each time</b> if you want a query prompt each time you open this folder definition. If you check this option, the following decision window will display each time you open the folder definition:</p> 
6	<p>If you want this folder definition to open automatically each time you navigate to this folder, click:</p> <p><input checked="" type="checkbox"/> <b>Open as Default</b></p>
7	<p>If you want this folder definition to be saved as a public folder (for others to access), click:</p> <p><input type="checkbox"/> <b>Public</b></p> <p> <b>Note:</b> If you click this box, other users will be able to access the folder definition and even use it as their default folder, but only you will be able to modify it.</p>
8	Click <b>&lt;OK&gt;</b> .

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## Defining Query Criteria for a Folder, Continued

### Subsequent Queries

**Note:** When you save a folder definition, the query criteria gets “locked in” to the folder definition. If you perform another query on the same folder definition, you actually query on the subset of records that could possibly be shown in that block.

**If you want to perform a new Query-by-Example on the complete set of records, first reset the query for the folder definition before performing the other query.**

### Resetting the Query Criteria

To reset the query criteria for a folder definition (for example, to perform a new Query-by-Example on the complete set of records), follow the steps below:

Step	Action
1	Click <b>F</b> older → <b>R</b> eset <b>Q</b> uery from the Main Menu Bar to erase the current query criteria. The current folder name and its data field layout will be retained.
2	Perform another query (see <i>How to Define Query Criteria for a Folder</i> ).
3	Click <b>F</b> older → <b>S</b> ave from the Main Menu Bar or the Save button on the Folder Tool Window to save the new query to your current folder definition.

### Viewing Query Criteria for a Folder

To view the query criteria for a folder definition, while in the folder:

- Click **F**older → **V**iew **Q**uery from the Main Menu Bar.

A **Folder Query** Window will open that displays the query criteria for the current folder definition.



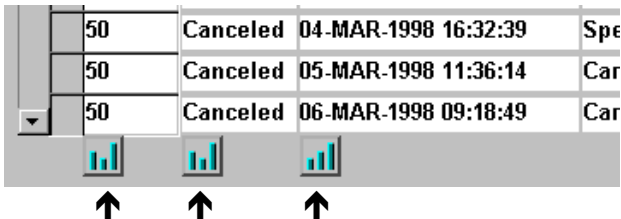
# Sorting the Order of Data in a Folder

## Purpose

For multiple-record folders, you can define the specific order in which records will display. To do this, you alter the sorting order of data.

## Sorting the Order of Data

To alter the sorting order of data in a multiple-record folder definition:



Step	Action
1	<p>While in the multiple-record folder block, move the data field(s) you want to sort on to one of the first three data fields.</p> <p>To move a data field, click in the data field and then click the Move Left button on the Folder Tool Palette:</p> 
2	<p>Click <b>F</b>older → <b>S</b>how <b>O</b>rders <b>B</b>y from the Main Menu Bar.</p> <p>You will now see an <b>Order By</b> button  under each of the first three data fields.</p> <p>◆ Example:</p> 

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## Sorting the Order of Data in a Folder, Continued

### Sorting the Order of Data (continued)

Step	Action
3	<p>Click the <b>Order By</b> button  of a data field you want to sort. Click the button again until the message line displays the desired sort setting.</p> <p><b>Note:</b></p> <p>Each <b>Order By</b> button  acts as a toggle to switch the way the data in the corresponding data field is sorted. The three sort settings are:</p> <ul style="list-style-type: none"> <li>• <b>Ascending</b></li> <li>• <b>Descending</b></li> <li>• <b>No Ordering</b></li> </ul> <p>When you click an Order By button, you will see the setting displayed in the message line. Each subsequent click will change the setting.</p> <p>◆ <b>Example:</b></p> <div data-bbox="812 1024 1070 1083" data-label="Text"> <p>Ascending Count: 10   v</p> </div> <p>If you define multiple sorts, the records will display in the order of the first data field's sort. Then, within that first sort order, the records will display by the sort in the second data field, and so on for the third data field.</p>
4	Click <b>Query</b> → <b>Run</b> from the Main Menu Bar to rerun the query in your folder definition to apply any ordering changes (sorts) to the records.
5	Click <b>Folder</b> → <b>Save Or Folder</b> → <b>Save As...</b> from the Main Menu Bar to save the query criteria to a folder definition (see <i>Managing Folder Definitions</i> ).

# Customizing the Display of Data in a Folder

## Purpose


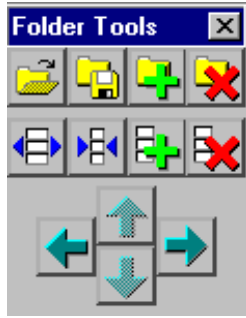
You can customize the presentation of data in a folder (that is, change the display layout) using the **Folder** menu and **Folder Tools**.

You can:

- Display only those data fields of interest to you.
- Instantly modify the column width, sequence, and labels of the data fields you want to display.
- Save your folder customizations for future use.
- Keep your folder customizations private or make them public for others to access.
- Make your customizations the default display for a folder.

## Customizing the Presentation of Data in a Folder

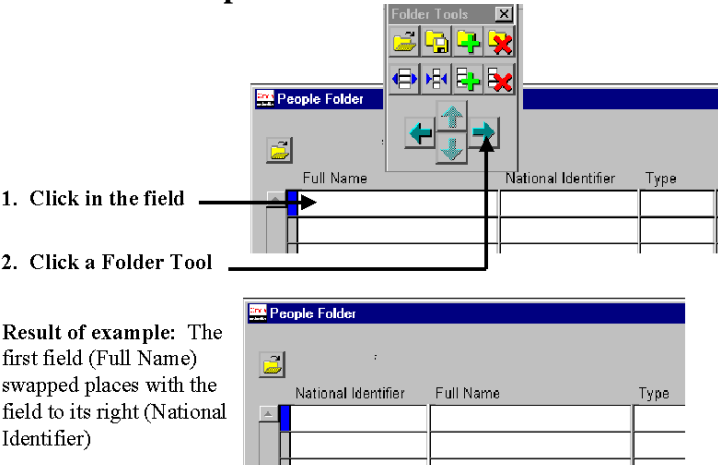
You can customize the layout of a folder before or after you run a query to retrieve records into the folder. (If you want to adjust the column width of any data fields, you may find it easier to judge the best width if you have retrieved some records).

Step	Action
1	Open a folder.
2	<p>Click the Folder Tools button  on the Toolbar. The <b>Folder Tool Palette</b> displays:</p> 

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## Customizing the Display of Data in a Folder, Continued

### Customizing the Presentation of Data in a Folder (continued)

Step	Action
3	<ul style="list-style-type: none"> <li>Click in any data field that you would like to move or adjust and then</li> <li>Click a <b>Folder Tools</b> button <i>Or</i> Click a corresponding item from the <b>F</b>older menu.</li> </ul> <p>◆ Example:</p>  <p>1. Click in the field</p> <p>2. Click a Folder Tool</p> <p>Result of example: The first field (Full Name) swapped places with the field to its right (National Identifier)</p>
4	<p>Continue making changes to the layout as desired. When the display is as you want it:</p> <ul style="list-style-type: none"> <li>Click <b>F</b>older → <b>S</b>ave Or <b>F</b>older → <b>S</b>ave <b>A</b>s... from the Main Menu Bar to save the display formats to a folder definition (see <i>Managing Folder Definitions</i>).</li> </ul>

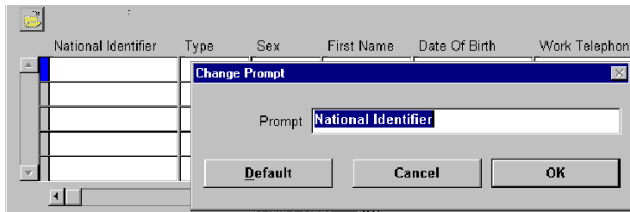
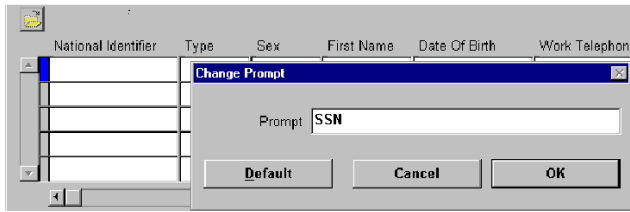

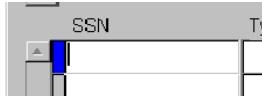
### Changing the Field Labels (Column Headings) in a Folder

You can change the data field labels (column headings) in a folder. This will not change the data field name in the database, it will change the label used in the folder's information display. You may find this feature helpful in making reports more understandable, if you choose to print or export folder data. For example, you may decide that "SSN" is a more meaningful label than "National Identifier."

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## Customizing the Display of Data in a Folder, Continued

### Changing the Field Labels (Column Headings) in a Folder (continued)

Step	Action
1	In a folder, click in a data field whose label (“field prompt”) you want to change.
2	<p>Click <b>Folder</b> → <b>Change Prompt...</b> from the Main Menu Bar. A <b>Change Prompt</b> Window displays.</p> <p>◆ <b>Example:</b></p> 
3	<p>Type a new data field label in the <b>Prompt</b> data field; e.g., SSN to replace National Identifier.</p> <p>◆ <b>Example:</b></p>  <p> <b>Note:</b> If the data field label has been changed from the original data field prompt, you can click <b>&lt;Default&gt;</b> to display the original (“default”) prompt (in this example, the default data field prompt is “National Identifier”).</p>
4	<p>Click <b>&lt;OK&gt;</b>. The new data field label will be displayed in the folder.</p> <p>◆ <b>Example:</b> “National Identifier” has been changed to “SSN.”</p> 
5	<p>Continue making changes to the layout as desired. When the display is as you want it:</p> <ul style="list-style-type: none"> <li>Click <b>Folder</b> → <b>Save Or Folder</b> → <b>Save As...</b> to save the display formats to a folder definition (see <i>Managing Folder Definitions</i>).</li> </ul>


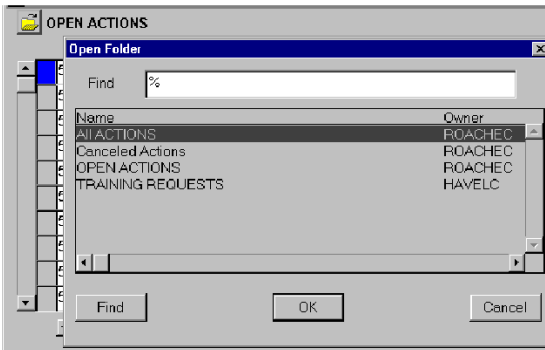
# Managing Folder Definitions

## Purpose

This section explains how to manage the folder definition you have created. After you have customized a folder's query criteria and layout, you can save the customizations to a folder definition. You can open and modify existing folder definitions, create and save new folder definitions, and you can also delete folder definitions.

## Opening a Folder Definition

To open an existing folder definition that does not display automatically as the default folder definition:

Step	Action
1	<ul style="list-style-type: none"> <li>Click the Open Folder button  in the upper left corner of the folder window.</li> <li><i>Or</i></li> <li>Click <b>F</b>older → <b>O</b>pen from the Main Menu Bar.</li> </ul> <p>A list of folder definitions displays.</p> <p>◆ <b>Example:</b></p> 
2	<p>Click the folder definition you wish to open, then click <b>&lt;OK&gt;</b>.</p> <p>The folder definition you selected displays.</p>

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## Managing Folder Definitions, Continued

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### Saving Modifications to a Folder Definition

In most cases, after you have customized a folder's query criteria and display you will want to save those alterations.

To save modifications to an existing folder definition, thereby revising the existing folder *without creating a new folder definition*, simply:

- Click the Save Folder button  on the Folder Tool Palette.

*Or*

- Click **F**older → **S**ave from the Main Menu Bar.
- 

### Creating a New Folder Definition

You can create and maintain a number of different folder definitions, based on unique variations in query criteria and display formats. There are two basic ways to create a new folder definition:

1. Create a new folder, customize it, then save it.


*OR*

2. Customize an existing folder and then perform the “Save As” function.

Both procedures will maintain the existing folder and create a new folder with your customizations.

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### New Folder Procedure


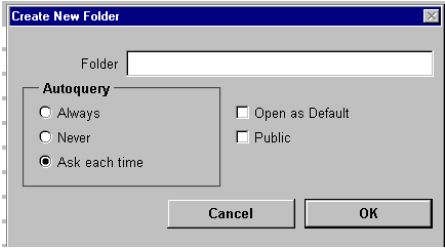



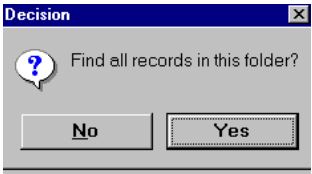
Step	Action
1	Navigate to a folder; e.g., <i>Civilian Inbox</i> .
2	Click the Folder Tools button  on the Toolbar. The Folder Tool Palette displays.

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## Managing Folder Definitions, Continued

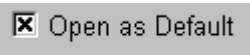






### New Folder Procedure (continued)

Step	Action
3	<ul style="list-style-type: none"> <li>Click the New Folder button  on the Folder Tools Palette.</li> <li>Or</li> <li>Click <b>F</b>older → <b>N</b>ew ... from the Main Menu Bar.</li> </ul> <p>A <b>Create New Folder</b> Window displays:</p> 
4	Type a new and unique name for the folder definition in the <b>Folder</b> data field.
5	<p>In the <b>Autoquery</b> box, click:</p> <p> <b>Always</b> if you want the query you define to perform every time you open this folder definition.</p> <p> <b>Never</b> if you do not want the query you define to be saved with this folder definition.</p> <p> <b>Ask each time</b> if you want a query prompt each time you open this folder definition. If you check this option, the following decision window will display each time you open the folder definition:</p> 

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## Managing Folder Definitions, Continued

### New Folder Procedure (continued)

Step	Action
6	<p>If you want this folder definition to be the one that opens automatically each time you navigate to this folder for the first time after opening the form, click:</p> <p></p> <p> <b>Note:</b> If you save a folder definition to “Open as Default” and then later save another folder definition as “Open as Default,” the second definition will be the new default.</p>
7	<p>If you want this folder definition to be saved as a public folder (for others to access), click:</p> <p></p> <p> <b>Notes:</b></p> <ul style="list-style-type: none"> <li>• If you click this box, other users will be able to access the folder definition and even use it as their default folder, but only you can modify it.</li> <li>• If you modify a public folder, saving it makes it a private folder.</li> </ul>
8	Click <OK>. The new name of the folder displays in the upper left corner of the <b>Folder</b> Window.
9	<p>Customize the folder’s query criteria and data display as you want for the new folder definition (refer to <i>Defining Query Criteria for a Folder</i> and <i>Customizing the Display of Data in a Folder</i>).</p> <p> <b>Note:</b> You can also perform the folder customization <u>before</u> you click the New Folder button (that is, before steps 3-8).</p>
10	<ul style="list-style-type: none"> <li>• Click the Save Folder button  on the Folder Tool Palette.</li> <li>Or</li> <li>• Click <b>F</b>older → <b>S</b>ave from the Main Menu Bar.</li> </ul> <p> <b>Caution:</b> You must save the new folder definition; it is not automatically saved when you create it.</p>

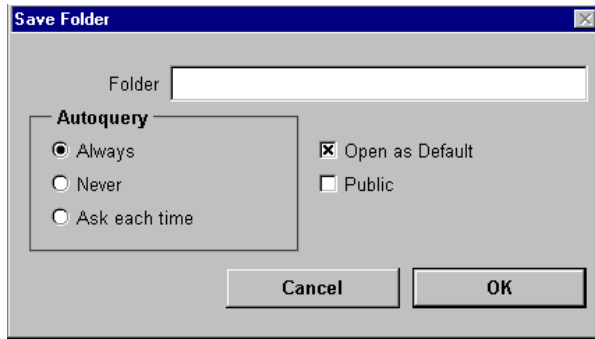
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## Managing Folder Definitions, Continued

### Save As Procedure

Follow the procedure below to customize an existing folder and then perform the “Save As” function. This will maintain the existing folder and create a new folder with your customizations.


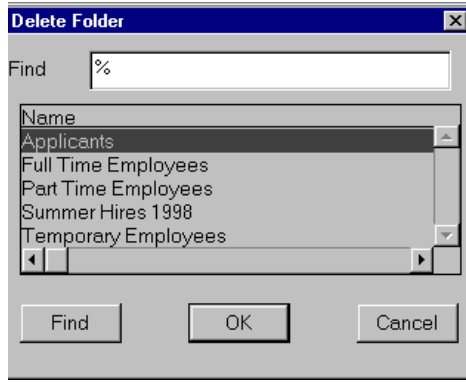
Step	Action
1	Customize the folder’s query criteria and data display as you want for the new folder definition (refer to <i>Defining Query Criteria for a Folder</i> and <i>Customizing the Display of Data in a Folder</i> ).
2	<p>Click <b>F</b>older → <b>S</b>ave <b>A</b>s... from the Main Menu Bar or the Folder Tool Palette Save Button on the Toolbar to save this criteria in a folder definition. A <b>Save Folder</b> Window displays:</p> 
3	<p>Follow steps 4-8 of the “New Folder Procedure” to title and select the save options in the <b>Save Folder</b> Window (it is the same as the Create New Folder Window).</p> <p>You have now created a new folder definition; the original folder definition will also be maintained.</p>

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## Managing Folder Definitions, Continued

### Deleting a Folder Definition

You can delete only folder definitions you have created.

Step	Action
1	Navigate to a folder.
2	<ul style="list-style-type: none"> <li>Click the Delete Folder button  on the Folder Tools Palette.</li> <li>Or</li> <li>Click <b>F</b>older → <b>D</b>efine from the Main Menu Bar.</li> </ul> <p>A <b>Delete Folder</b> Window displays.</p> <p>◆ <b>Example:</b></p> 
3	Click a folder definition from the list in the <b>Delete Folder</b> Window, then click <b>&lt;OK&gt;</b> .

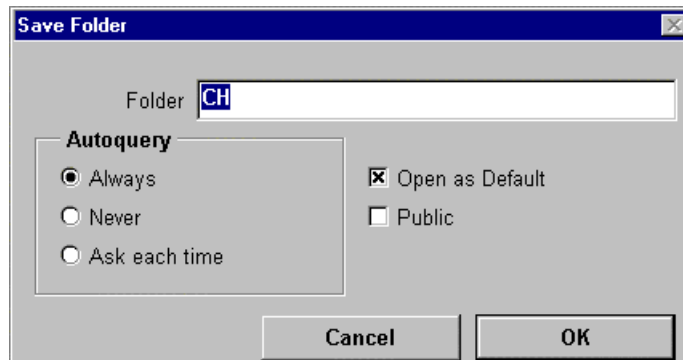
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## Managing Folder Definitions, Continued

### Querying for a Folder

You can define and alter the query criteria for any folder and save the criteria in a folder definition.

Step	Action
1	With the <b>Civilian Inbox</b> Window open, run the query that you want by using <b>Query</b> → <b>Find</b> from the Main Menu Bar or F8. At least one record must be retrieved for the folder to memorize the query.
2	Click <b>Folder</b> on the Main Menu Bar then click Save As, if you want to save this query criteria in a folder definition.
3	The <b>Save Folder</b> Window displays. Type in a name in the <i>Folder</i> data field. Click one of the buttons under <b>Autoquery</b> , select the checkbox for “Open as Default” or “Public,” and click <OK>.



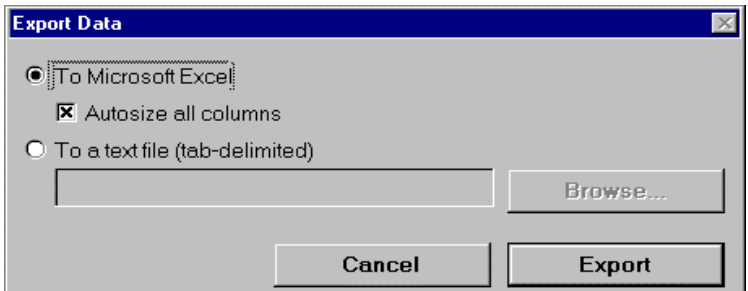
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## Managing Folder Definitions, Continued

### Resetting the Query

Step	Action
1	With the <b>Civilian Inbox</b> Window open, run the query that you want by using <b>Query</b> → <b>Find</b> from the Main Menu Bar or F8.
2	Click <b>Folder</b> on the Main Menu Bar then click <b>Reset Query</b> . This clears the WHERE clause from the current folder definition but retains the current folder name and its field layout. Click <b>Folder</b> and then <b>View Query</b> from the Main Menu Bar to view the query criteria for a folder definition.
3	Perform another query and click <b>Folder</b> and then <b>Save</b> from the Main Menu Bar or Folder Tool Palette Save button to save the new query to your current folder definition.
4	To alter the sorting order of data in a multiple-record folder definition, select <b>Folder</b> and click <b>Show Order By</b> from the Main Menu Bar. This menu item acts as a toggle switch to display the <b>Order By</b> buttons for the first three fields of a multiple-record folder block. The <b>Order By</b> buttons appear beneath those fields that can be changed.

**Exporting Data** Since only 10 entries display in a window, you may want to export your data into an Excel spreadsheet or to a text file.

Step	Action
1	<p>With the folder open to the data you want to export, on the Main Menu Bar, click <b>Action</b> and then click <b>Export</b>. The <b>Export Data</b> Window displays with the button selected for “To Microsoft Excel”.</p> 

*Continued on next page*

## Managing Folder Definitions, Continued

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### Exporting Data (continued)

Step	Action
2	Click < <b>Export</b> >. A <b>Progress Message</b> displays. Once the data populates, follow Excel spreadsheet procedures for sorting and printing.
3	If you want to export to a text file, select the second button. The data field opens. Click < <b>Browse...</b> > which is now activated. Select the location for your file and give it a name.
4	Access the drive where you have exported your file, open it, and proceed.

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